

Project Launch Onsite Agenda

Thursday, August 29

Time	Session	Goals	Attendees
8:30-9:00am	Welcome and Goal Setting: Implementation Strategy Sign Off	Strategic lead holds leadership team discussion on goals and priorities for the partnership. Program Sponsor and leadership team sign off on phased approach for implementation strategy-users and features.	<ul style="list-style-type: none"> Program Sponsor Program Owner Leadership Team
9:00-10:00am	Onboarding Process Mapping	Share secret shopping notes, process map student experience, identify key action items for inclusion in Navigate Student. Identify key campus resources for students.	<ul style="list-style-type: none"> Leadership Team Content Team Key stakeholder involved with onboarding process
10:00-11:00am	Content Team Working Session	Introduction to the importance of Content. Create strategy for making default content more custom. Establish next steps for content review and validation.	<ul style="list-style-type: none"> Content Team Content Administrator Promotion Team (Optional)
11:00-12:00pm	Academic Planning Session	Understand decision points and process for building program templates.	<ul style="list-style-type: none"> Leadership Team Academic Planning Team (including counselors)
12:00-1:30pm	Alerts and Cases Working Lunch	Overview of EAB's early alert platform; including Progress Reports, Alerts and Case Management	<ul style="list-style-type: none"> Leadership Team Faculty Champions Key stakeholders involved in early alert decision making process
1:30-2:30pm	User Roles and Permissions	Review each user role type and associated permissions in the Navigate platform. Agree on access levels.	<ul style="list-style-type: none"> Leadership Team Application Administrator(s) Technical Lead
2:30-3:30pm	Workflow Team Configuration <i>tentative based on SARS decision</i>	Design, configure, and test workflow for Phase I: <ul style="list-style-type: none"> Check-in process (i.e. kiosks) Appointment scheduling (student service categories, services, locations, cancelation reasons) Summary Report and Notes (Note reasons, Meeting Types, Format of Summary report) 	<ul style="list-style-type: none"> Application Administrator(s) Workflow and Training Team 2-3 Counseling leads who are knowledgeable about current processes in their specific unit, and are able to make decisions on workflow set-up within Navigate
3:30-4:00pm	Promotion Team Working Session	Share EAB best practices for developing a robust Communication plan. Identify Navigate value propositions for key stakeholders.	<ul style="list-style-type: none"> Promotion Team Content Team (Optional)
4:00-4:30pm	Debrief and Next Steps	Share summary of accomplishments during the onsite. Ensure clarity on next steps and timelines for leadership and engagement teams.	<ul style="list-style-type: none"> Program Sponsor Program Owner Leadership Team (optional)

Virtual Sessions (Post-Onsite):

Time	Session	Goals	Attendees
30 minutes	Training Strategy Session	Review available training resources and establish timeframe for on-campus trainings based on implementation strategy	<ul style="list-style-type: none"> ▪ Workflow and Training Team ▪ Leadership Team ▪ Application Administrator(s)
60 Minutes	App Admin Training	Training on App Admin role and expectations. Review backend configurations in Navigate platform.	<ul style="list-style-type: none"> ▪ Leadership Team ▪ Application Administrator(s)
30 Minutes	CAT Training	Training on Content Admin role and expectations. Review backend configurations in Navigate platform.	<ul style="list-style-type: none"> ▪ Content Administrator(s) ▪ Content Team (Optional)
45 minutes	Analytics Team Meeting	Introduce Analytics features that will be activated in the platform after Phase I launch (i.e. Institution Reports Demo, Population Health Dashboards, Success Markers and Risk Model)	<ul style="list-style-type: none"> ▪ Analytics Team ▪ Program Owner ▪ Leadership Team (optional)
30 minutes	Kiosk Discussion	Introduction to Kiosk functionality in Navigate platform (i.e. card swipes and scanners for appointments/drop ins/tracked time)	<ul style="list-style-type: none"> ▪ Application Administrator(s) ▪ Workflow Training Team lead ▪ Student Support Staff and/or Tutoring Center

Logistics for Onsite:

- **Room Requirements and Configuration**
 - Projector Screen
 - Internet Access
 - Microphones (if in a large Auditorium)
 - Conference-style rooms (preferred in smaller groups) so that everyone is facing one another during working sessions
- **Parking**
 - Parking Passes?
 - Instructions of where to meet before the first session each day